

Manager: Add or Remove a Co-Planner

The following steps guide you through the process to add or remove a co-planner to an employee's Kickoff or Wrap Up tasks. Managers who anticipate being unable to complete their steps of an employee's Kickoff or Wrap Up should add a co-planner to assume their responsibilities.

Add a Co-Planner

STEP 1. Sign into your **MyPath** account at **www.mass.csod.com** (Login is your employee ID).

STEP 2. On the homepage, look for the **Your Action Items** heading on the left and select the action item link the employee whose review you want to add a co-planner.

STEP 3. **FY22 MassPerform Kickoff** or **Overview** (Wrap-Up) screen will open. In the top right-hand corner, select the **Options** drop-down list and select **Add Co-Planners**.

STEP 4. From the search window that opens, **search** for the co-planner you wish to add. From your search results, confirm the correct individual to add, then **select their name**. Repeat for any other co-planners you wish to add, then click **Save**.

The manager, employee and co-planner will all receive an email confirming that a co-planner has been added. The co-planner will now see an Action Item for the employee being reviewed.

Remove a Co-Planner

STEP 1. Repeat Steps 1 – 3 from the **Add a Co-Planner** instructions above.

STEP 2. From the search window that opens, you will see any current co-planners listed. To remove, **select the "X"** in the co-planner's name box. Repeat for any other co-planners you wish to remove, then click **Save**.

The manager, employee and co-planner will **not** receive an email confirming that a co-planner has been removed, but any outstanding steps will be removed from the co-planner's Action Items.

Notes on Co-Planners:

- Managers can only add or remove co-planners when they have an **open action item** to complete. To add a co-planner when there is no open action item, contact the Employee Service Center for assistance.
- Co-planners can **only** complete Kickoff and Wrap Up steps on behalf of the employee's manager. The employee being reviewed **will not appear** as a direct report of the co-planner.
- Co-planners who are added during Kickoff or Wrap Up can review expectations and goals for the employee they have been assigned by doing the following:
 - Click the top-right navigation button and select **Performance** then **Performance Reviews**.
 - From the **My Assigned Reviews** tab, check the **Show completed and expired tasks** box.
 - The Kickoff or Wrap Up Task for the employee assigned to the co-planner should appear in the results list. Click the **review link** and select the **Expectations and Goals** tab to review the employee's expectations and goal progress.
- If a manager will be absent long-term, consider updating the employee's manager in HR/CMS to allow the employee's temporary manager more complete MyPath functionality.